

Stephanie Denman EA Privacy Policy

Your privacy is important to us, and maintaining your trust and confidence is one of our highest priorities. We respect your right to keep your personal information confidential and understand your desire to avoid unwanted solicitation. Please read this to learn how we handle your personal information.

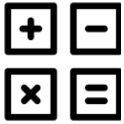
A. Types of Information We Collect: We collect non-public personal information that is provided by you or obtained by us with your authorization to prepare your personal income tax returns and provide bookkeeping services to you.

Examples of Sources from Which We Collect Information:

- Client interviews and/or phone calls with you,
- Tax return organizers,
- Letters and/or emails with you,
- Tax and bank records.

B. Parties To Whom We Disclose Information: We do not disclose any non-public personal information about our clients or former clients to our affiliates or to non-affiliated third parties except as permitted by law and any state or federal Code of Professional Conduct. Non-public personal information about you and our former clients may be disclosed to both our affiliates and non-affiliated third parties as permitted by law, our Code of Professional Conduct, and Ethics Rulings of the IRS, as follows:

- Complying with a validity issued and enforceable subpoena or summons
- In the course of a review of our firm's practices under the authorization of a state or national licensing board, or as necessary to properly respond to an inquiry or complaint from such a licensing board.
- A review of a professional practice in conjunction with a prospective purchase, sale or merger of all or part of our practice, provided that we take appropriate precautions (for example, through a written confidentiality agreement) so the prospective purchaser does not disclose information obtained in the course of the review.
- Participating in actual or threatened legal proceedings or alternative dispute resolution proceedings either initiated by or against us, provided we disclose only the information necessary to file, pursue or defend against the lawsuit, and take reasonable precautions to ensure that the information disclosed does not become a matter of public record.
- Providing information to affiliates of the firm and non-affiliated third parties who perform services or functions for us pursuant to a third party or affiliate from disclosing or using the information other than for the purposes for which the information was disclosed (for example, using an outside service bureau to proceed with clients' tax returns, or using a records-retention agency to store clients' records).



STEPHANIE DENMAN EA
TAX & BOOKKEEPING SERVICE

1012 S Stapley Dr. Ste. 114
Mesa, AZ 85204
Call/text 480.290.0726
Fax 480.907.1540

admin@stephaniedenmanea.com
www.stephaniedenmanea.com

C. General Restrictions on Disclosure of Non-Public Personal Information to Affiliates and Non-Affiliated Third Parties: As tax preparers, we are prohibited by the Internal Revenue Code Section 7216 from disclosing your income tax return information without your consent, other than for the specific purpose of preparing, assisting in preparing or obtaining and providing services in connection with the preparation of an income tax return for you.

D. Confidentiality and Security of Non-Public Personal Information: We restrict access to non-public personal information about you to those employees and other parties who must use that information to provide services to you. Their right to further disclose and use the information is limited by (our employee code of conduct, if applicable), applicable law, our Code of Professional Conduct and non-disclosure agreements where appropriate. We also maintain physical, electronic, and procedural safeguards in compliance with applicable laws and regulations to guard your non-public personal information.